

5.3 Tutorials

Bright Pattern Documentation

Generated: 9/28/2021 6:54 pm

Content is available under license unless otherwise noted.

Table of Contents

Table of Contents	2
Agent Tutorials	3
Calendar Tutorials	3
Calls Tutorials	3
Articles	3
Basic Information	3
Accepting/Rejecting Calls	3
After Call Work and Dispositions	3
Callback Reservation	4
Conferences	4
Consultations and Transfers	4
Directory	4
Favorites	4
Follow-ups	4
Mute and Hold	4
Placing Calls	4
Recording and Voice	4
Redialing	4
Remote Assistance	4
Sending Numeric Information	5
Service Queue	5
Cases and Email Tutorials	5
Articles	5
Accepting Email	5
Creating Cases	5
Follow-ups	5
Fonts	5
Handling Email	5
Masking Data	5
Print	5
Retrieving Email from Queue	6
Reviewing Email	6
Chat Center Tutorials	6
Articles	6
Service Chat Tutorials	6
Articles	6
Accepting/Rejecting Chats	6
Audio/Video Chats	6
Canned Responses	6
Co-browsing	7
Creating Cases	7
Flagging Chats	7
Follow-ups	7
Forms	7
Multiple Chats	7
Sending Chat Messages	7
Terminate the Chat	7
Transfers	7
Contacts Tutorials	7
Articles	7
Knowledge Base Tutorials	8
Articles	8
Outbound Campaign Tutorials	8
Articles	8
Search Tutorials	8
Articles	8
States Tutorials	9
Articles	9

Agent Tutorials

Agent tutorials explain how to perform specific tasks within the Agent Desktop application.

Explore tutorials to learn more about the following topics:

- [Calendar](#)
- [Calls](#)
- [Cases and Email](#)
- [Chats](#)
- [Contacts](#)
- [Knowledge Base](#)
- [Outbound Campaigns](#)
- [Search](#)
- [States](#)

Calendar Tutorials

These tutorials provide step-by-step instructions for everything related calendars:

- [How to Edit Existing Events](#)
- [How to Open the Calendar](#)
- [How to Schedule an Event](#)

Calls Tutorials

These tutorials provide step-by-step instructions for everything related voice calls: dialing, accepting, transferring, muting, and flagging.

Articles

Basic Information

- [Call Controls](#)

Accepting/Rejecting Calls

- [How to Answer an Incoming Call](#)
- [How to Reject an Incoming Call](#)

After Call Work and Dispositions

- [Dispositions and Notes](#)
- [How to Wrap Up After Call Work](#)

Callback Reservation

- [About Callback Reservation](#)

Conferences

- [How to Host a Conference](#)
- [How to Participate in a Conference](#)

Consultations and Transfers

- [How to Make Consultations and Transfers](#)

Directory

- [How to Use the Directory](#)

Favorites

- [How to Use Favorite Contacts](#)

Follow-ups

- [How to Schedule a Follow-up Activity](#)

Mute and Hold

- [How to Hold and Retrieve a Call](#)
- [How to Mute a Call](#)
- [How to Release a Call](#)

Placing Calls

- [How to Make an Internal Call](#)
- [How to Make an Outbound Call](#)
- [How to Speed Dial Through External IVRs](#)

Recording and Voice

- [How to Connect a Voice Application to Your Call](#)
- [How to Record a Call](#)
- [How to Stop Call Recording](#)
- [How to Use Prerecorded Messages](#)
- [Voice Signatures](#)

Redialing

- [How to Redial a Previously Dialed Number](#)

Remote Assistance

- [Overview: Remote Assistance During Calls](#)
- [How to Start Remote Assistance During a Phone Call](#)
- [How to Transfer a Call with an Active Remote Assistance Session](#)

Sending Numeric Information

- [How to Send Numeric Information](#)

Service Queue

- [How to Place a Call in a Service Queue](#)

Cases and Email Tutorials

The Cases and Email section's tutorials explain how to use Agent Desktop to process customer requests made via email, as well as what to do with customer cases. Emails are bundled into cases when multiple email messages from the same contact are related to the same issue.

Articles

Accepting Email

- [How to Accept an Email](#)

Creating Cases

- [How to Create New Cases](#)

Follow-ups

- [How to Use Pinned Cases to Send a Follow-up Outbound Email](#)
- [How to Use Cases to Send a Follow-up Outbound Email](#)

Fonts

- [How to Change Default Email Font](#)

Handling Email

- [How to Close an Email without Replying](#)
- [How to Change an Assigned Email Service](#)
- [How to Compose a Reply](#)
- [How to Transfer an Email](#)
- [How to Forward an Email](#)
- [How to Send a New Outbound Email](#)
- [How to Save an Email as a Draft](#)
- [How to Copy and Paste Images into Email](#)

Masking Data

- [How to Mask Sensitive Data](#)

Print

- [How to Print an Email](#)

Retrieving Email from Queue

- [How to Retrieve an Email from the Team Queue](#)
- [How to Retrieve an Email from Personal Queue](#)

Reviewing Email

- [How to Review an Incoming Email](#)

Chat Center Tutorials

The Chat Center allows you to send and receive messages to individual users or to groups in your contact center. We call these types of chat interactions *personal chats*. The chat interactions that you have with customers are called *service chats*.

Articles

- [How to Use Personal Chat](#)
- [How to Use Group Chat](#)

Service Chat Tutorials

If chat is enabled for your contact center, you will be chatting with either other contact center users via the Chat Center, or with customers routed to you via service chats.

The Chat Center allows you to send and receive messages to individual users or to groups in your contact center. We call these types of chat interactions *personal chats*. The chat interactions that you have with customers are called *service chats*.

Articles

Accepting/Rejecting Chats

- [How to Accept a Chat Request](#)
- [How to Reject a Chat Request](#)

Audio/Video Chats

- [How to Have an Audio Chat](#)
- [How to Have a Video Chat](#)

Canned Responses

- [How to Create and Edit Canned Chat Responses](#)

Co-browsing

- [How to Co-browse with Surfly Integration](#)
- [How to Co-browse](#)

Creating Cases

- [How to Create a Case from a Chat Session](#)

Flagging Chats

- [How to Flag an Interaction](#)

Follow-ups

- [How to Schedule a Follow-Up Activity from a Chat Session](#)

Forms

- [How to Send a Secure Form](#)

Multiple Chats

- [Handling Multiple Chat Sessions](#)

Sending Chat Messages

- [Chat Messages](#)
- [How to Send and Receive Pictures and Documents](#)

Terminate the Chat

- [How to End a Chat Session](#)

Transfers

- [How to Transfer Your Chat Session](#)

Contacts Tutorials

Agent Desktop's Search and Preview Records section, formerly known as *Contacts*, stores information about a person's contact details, activity history, cases, call recordings, chat transcripts, and contains a powerful search tool.

For more information, see [Search and Preview Records Overview](#) as well as our [Search tutorials](#).

Articles

- [How to Create a New Contact](#)
- [How to Edit an Existing Contact](#)

Knowledge Base Tutorials

Knowledge Base is a collection of articles curated by your contact center. These articles address agent training, templates, preapproved replies to customer queries, email message templates, policy information, and much more. You can use Knowledge Base to find answers to customer inquiries, improve response times, and provide consistent replies to customers during service interactions.

Articles

- [How to Contribute Content to the Knowledge Base](#)
- [How to Use a Knowledge Base Article](#)

Outbound Campaign Tutorials

Outbound Campaigns tutorials will show you how to participate in outbound campaign in either predictive, progressive, or preview mode.

Articles

- [How to Reject a Calling Record](#)
- [How to Review a Calling Record](#)
- [How to Reschedule a Call Attempt](#)

Search Tutorials

Agent Desktop's Search and Preview Records section, formerly known as *Contacts*, contains the [search bar](#) that allows you to look up contacts, cases, and much more. Search tutorials will show you how to use Agent Desktop's search bar as well as shortcuts to access case and contact information.

For more information, see [Search and Preview Records Overview](#) as well as our [Contacts tutorials](#).

Articles

- [How to Conduct Advanced Searches](#)
- [Using URL Variations to Access Case and Contact Information](#)

States Tutorials

States tutorials will show you how to switch to a different state during your working session.

Articles

- [How to Interpret Your Current State Information](#)
- [How to Make Yourself Ready](#)
- [How to Make Yourself Not Ready](#)